

AGENDA
EXCOMM MEETING
Trusts and Estates Section
State Bar of California

April 28-30, 2006
Silverado Resort
Friday 1:00 p.m. to 4:00 p.m.
Saturday 9:00 a.m. to 12:00 p.m.
Sunday 9:00 a.m. to 11:30 a.m.

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"After probate, family members will receive duplicate videos."

WELCOME, INTRODUCTIONS AND REPORTS OF CHAIR/VICE CHAIR

- 1 Welcome & Introductions [POTTS]
- 2 Approval of Minutes of March Meeting [POTTS]
- 3 Report of Chair [POTTS]
- 4 Report of Vice Chair [HARTOG]
- 5 Report of Section Administrator [ORLOFF]

II ADMINISTRATIVE MATTERS

- 1 Finance and Budget - Financial Report [HARTOG]
- 2 Nominating Committee [FITZPATRICK]

III COMMITTEE, TASK FORCE AND LIAISON REPORTS

- 1 Conference of Delegates [TONG]
 - a Resolutions
- 2 CLRC Committee [MOORE/STREISAND]
 - a No Contest Clause Study [Kovar/Streisand]
 - b Family Law Money Judgments/Enforcement After Death - AB 2126
 - c Revocable Deed Study [Ito/MacDonald]
- 3 Litigation Committee [KOVAR]
 - a New cases
 - b Projects
 - (1) Proposed model ADR rules [Henden] (Saturday session)
 - (2) Crosby case - Attorney client privilege after death [Horton]
 - (3) Prohibiting Mandatory Arbitration for Elders and Dependents [Corey]
 - (4) Rule of Court 1622(d) [Horton]
 - (5) McAdams and Borissoff [Lodise]
- 4 Computer/Internet [GAW]
 - a Workgroup Project [Orloff] (Saturday session)
 - b Website Protocols

a AB 1363 - Omnibus conservatorship and guardianship reform act

b SB 1116 - Least Restrictive Residence, Sale of
Residence Amendments

c SB 1550 - Professional Fiduciaries Act (support
if amended) [Corey/Wallet]

6 Incapacity [STERN]

(1) AB 2340 - Healthcare Surrogates (BLS 2006-
ort) [Stern]

(3) SB 1280 - Incapacitated persons (oppose)

(4) SB 1609 - Reverse mortgages: annuities
(support) [Corey/Tong]

(6) SB 1197 - DHS Notice of Death

(1) SB 1307 - HIPAA Conformity [Horton]

[Horton]

d Projects

(1) PC § 1470 - Appointed counsel for already presented [Beltran]

7 Educating Seniors [COREY]

(1) SB 308 Recording Fees: Elder and Dependent

Financial Abuse (support) [Pollard]

(2) SB 192: Annuity Sales to Seniors/Suitability Standards

(support) [Corey]

b Projects

(1) Elder Abuse Brochure [Corey/Tong]

(2) Information Card and Senior Outreach Program [Tong]

(3) Coordination with Office of Emergency Services [Pollard]

8 AB 651 - California Compassionate Choices Act Task Force [TONG]

(technical amendments)

9 Estate Planning Committee [MACDONALD]

a Legislative Bills

(1) AB 69 - Multiple Party Accounts - (support if amended) [MacDonald]

(2) AB 2658 - Tangible Personal Property (support if amended) [Wallet/Jaech]

(3) SB 1272 - Advance Healthcare Directives (follow) [MacDonald]

b Our Pending Legislative Proposals

(1) AB 2034 - Certificate of Independent Review [Moore]

c Projects

(1) Government Code Section 8201

10 Income and Transfer Taxes [HAYES]

a Legislative Bills

(1) Property Taxation

(a) SB 1607 - Property Taxation (follow)

(b) AB 2799 - Sibling Transfers (follow)

(2) Income and Corporation Taxes - SB 1713 (follow)

b Federal Legislative Developments

11 Trust & Estate Administration Committee [HAND]

a Legislative Bills

(1) AB 2864 - Statute of Limitations (follow)

(2) SB 2267 - Probate Limitation Increases (support, recommend amendment [Hand])

b Our Pending Legislative Proposals

(1) SB 1211 - Creditor Claim Harmonization [Hartog]

(2) AB 2347 - UPAIA cleanup [Burger]

(3) AB 2042 - Trustee Removal for Incapacity [Horton]

c Projects
(1) Arluk/Dobler & Trust Creditor Claim Issues
[Wallet]

12 Ethics Committee [HORTON/LODISE]
a Report of Liaison to Rules Revision Commission/
B&PC § 6068.5 [Stern/Lodise]
b Status of Ethics Guide Update (target: annual
meeting)

13 Education [TONG]
a State Bar Annual Meeting Programs
b Stand Alone programs
(1) International Estate Planning [Ito]
(2) Form 706 Preparation [Orloff/Tong]
c 2007 Winter SEI
d Your Legal Rights [Tong]
e 2007 State Bar Grant Proposal [Tong]

14 CEB [GOOD]
a Upcoming Programs

15 Membership & Marketing [LAWSON]
a Membership count
b Marketing of education programs
c Staffing tables at MCLE programs

16 Legislation [REGGIARDO]
a Timeline for response to pending bills
b Timeline for TEEExComm legislative proposals
c Mandatory procedures re legislative proposals
d Online Bill Tracking legislative information:
www.leginfo.ca.gov/

IMPORTANT GUIDELINES:

- Please use approved format for legislative proposals.
- Please use approved comment form for legislation comments.
- Always write to Larry Doyle, not directly to a member of legislature or legislative staff.
- Confirm testimony needs with Legislation Chair.

• If you agree to testify, be there unless
otherwise notified

- 17 Quarterly [STREISAND]
 - a Spring 2006 Issue
 - b Summer 2006 Issue
 - Solicitation of articles
 - d Advertising [Hayes]
- 18 NCCUSL [HENDEN]
 - a Uniform Trust Act/Professor English [Moore]
- 19 Family Law Liaison [MOORE]
- 20 New Business
- 21 COMING ATTRACTIONS

FUTURE EXCOMM EVENT
June 3, 2006
LAX Marriott